FORRESTER®

Unlocking Value With Remote Work And Modern Management

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Overview

Situation

Approach

Opportunity

Conclusion

Illuminating The Benefits Of Remote Work

The COVID-19 pandemic has forced many organizations to reconsider their long-term strategies for flexible working, which is now essential for business continuity and employee retention. However, doing this well requires organizations to formalize a structure for remote work that mitigates major challenges like outdated technology, access to relevant information, and even security.

In November 2020, VMware and Bytes commissioned Forester Consulting to evaluate the state of remote work and modern management tools at organizations based in the UK. Through our survey of 154 IT decision-makers, we sought to uncover the state of remote work, as well as the challenges firms face and the opportunities they have to enhance remote work during these unprecedented times.

Key Findings

As the pandemic becomes more controllable, organizations lean on cloud services to ensure business continuity and enhanced EX.

Organizations are better equipped to handle disruptions than they were just a year ago.

Security and data loss are top concerns for IT decision-makers.

IT leaders see holistic opportunities with modern management to support remote work and boost EX.

IT Focuses On Employee Experience In The Age Of Flexible Working

In a normal year, just 5% of global information workers primarily worked from home.[1] COVID-19 has not only accelerated that shift to remote work but also forced organizations to offer more mobility and flexible workstyles for its employees, according to 71% of decision-makers.
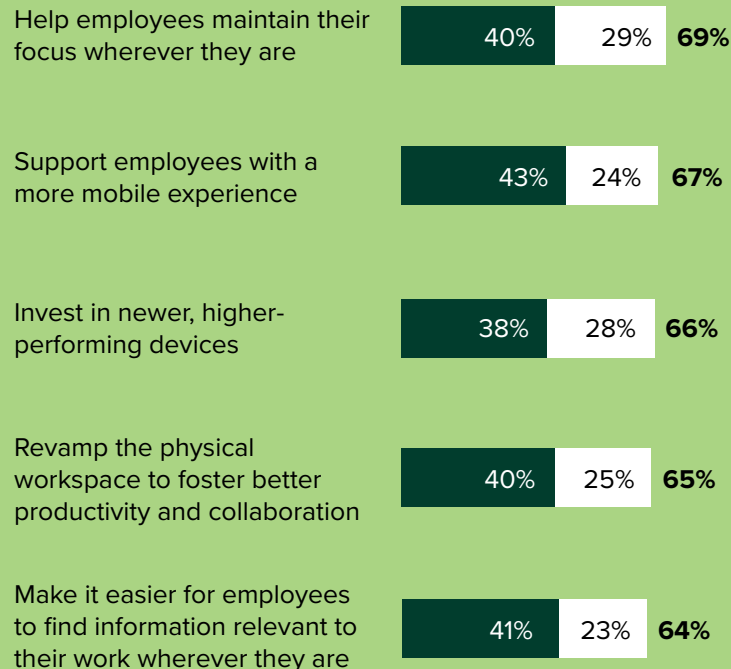
This year, IT decision-makers (ITDMs) intend to improve the remote work experience by helping employees maintain focus wherever they are (69%), improving mobility (67%), and investing in new devices (66%). ITDMs also plan to offer the right tools for employees to do their jobs and find relevant information wherever they are (64%).

66% of UK ITDMs anticipate a higher rate of employees working remotely; 33% believe it depends on government guidelines and regulations.

"Which of the following are likely to be your organization's top digital employee experience initiatives over the next 12 months?"

● High priority   ○ Critical priority

	High priority	Critical priority	Total
Help employees maintain their focus wherever they are	40%	29%	**69%**
Support employees with a more mobile experience	43%	24%	**67%**
Invest in newer, higher-performing devices	38%	28%	**66%**
Revamp the physical workspace to foster better productivity and collaboration	40%	25%	**65%**
Make it easier for employees to find information relevant to their work wherever they are	41%	23%	**64%**

Overview

Situation

Approach

Opportunity

Conclusion

The Worst Is Over, Leaving Organizations With An Opportunity

In the first half of 2020, firms performed admirably, getting people home quickly with all the essentials they needed. But as the pandemic raged on, key challenges like poor access to information (51%), gaps in technology (50%), and inability to measure results (56%) emerged. Alignment between business and IT worsened, and constrained budgets kept organizations from addressing top priorities.

As we enter 2021, ITDMs see hope, particularly with the arrival of new budget and better alignment between IT and the businesses.

Firms have learned from the lessons of 2020: Budgets are returning, collaboration between business and IT is increasing, and business innovation is shaping the future of work.
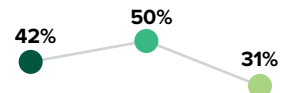
"What have been the most difficult challenges related to supporting remote work? What do you anticipate will be the biggest challenges going forward?"

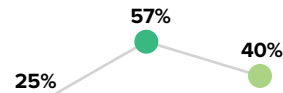● Jan to June 2020   ● July to Dec 2020   ● Future 2021+

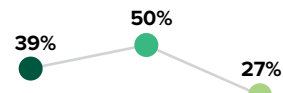Poor-quality, inconsistent, or inaccesible company resources
38% · 51% · 35%
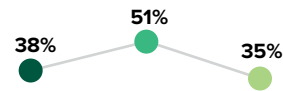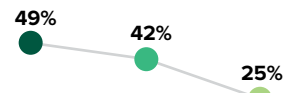
Poor alignment between IT and business
42% · 50% · 31%

Employee recruiting and retention
25% · 57% · 40%

Lack of required technology
39% · 50% · 27%

Limited budget to reach to market changes
49% · 42% · 25%

Overview

Situation
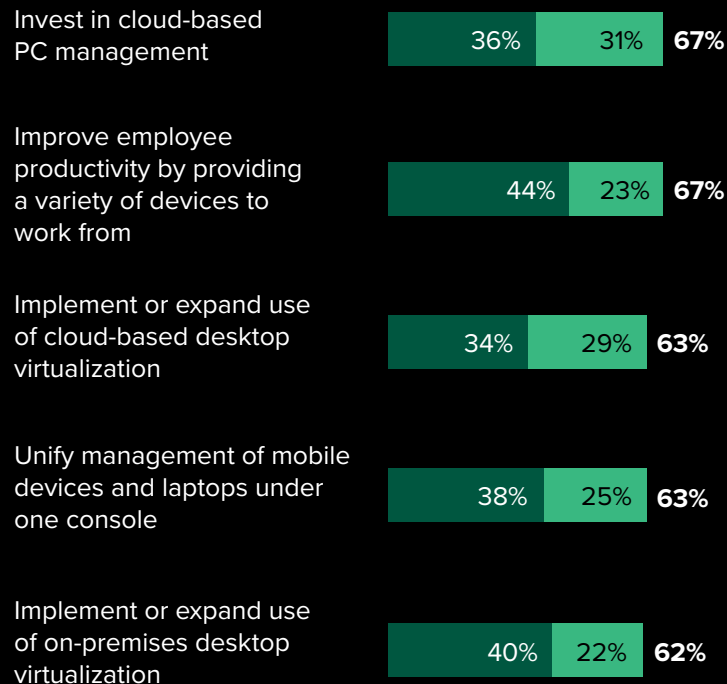
Approach

Opportunity

Conclusion

Applying Cloud Concepts To EUC Is The Key To A Better Remote Work Experience

In 2021, ITDMs see opportunity to improve the remote worker experience by reinvesting in end-user computing (EUC) platforms, whether implementing cloud-based PC management (67%), investing in more types of devices (67%), or expanding cloud-based desktop virtualization (63%).

Regardless of the technology investment, one thing is clear: Cloud is the future for EUC innovation and is applicable for any and all forms of EUC, whether it's management of physical devices, hosting of compute, or embracing lighter-weight cloud-based operating systems. All of these are prompting IT leaders to look to cloud as a solution. Cloud desktops are evolving to support better management, improved EX, and a secure environment.

"Which of the following technologies are likely to be your organization's priorities over the next 12 months?"

● High priority ● Critical priority

Invest in cloud-based PC management
36% | 31% | **67%**

Improve employee productivity by providing a variety of devices to work from
44% | 23% | **67%**

Implement or expand use of cloud-based desktop virtualization
34% | 29% | **63%**

Unify management of mobile devices and laptops under one console
38% | 25% | **63%**

Implement or expand use of on-premises desktop virtualization
40% | 22% | **62%**

Overview

Situation

Approach

Opportunity

Conclusion

EUC Innovation Will Address Challenges With EX And Security

Outside of the lack of alignment and budgets, organizations have faced challenges with areas that directly impact employee productivity and thus the bottom line. EUC innovation helps:

Employee recruiting and retention. Cloud-based PC management improves the onboarding employee experience (EX). New employees thus have a better experience at work and are likely to evangelize the firm.

Managing coordination with channel partners. New cloud models simplify integration between on-premises investments and cloud players that you may already have in-house.

Clear strategy. The cloudification of EUC will help ITDMs form a clear vision about what the experience should look like.

"What have been the most difficult challenges related to supporting remote work? What do you anticipate will be the biggest challenges going forward?"

● Jan to June 2020   ● July to Dec 2020   ● Future 2021+

Employee recruiting and retention
57%
40%
25%

Managing coordination with our channel partners
53%
35%
29%

Unclear strategy
53%
32%
29%
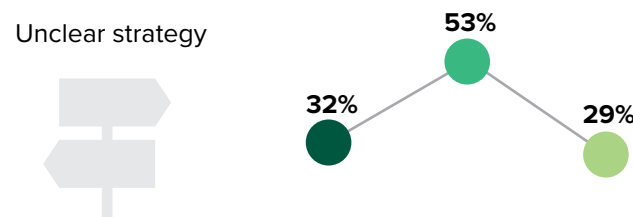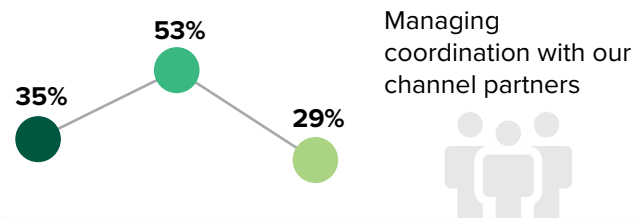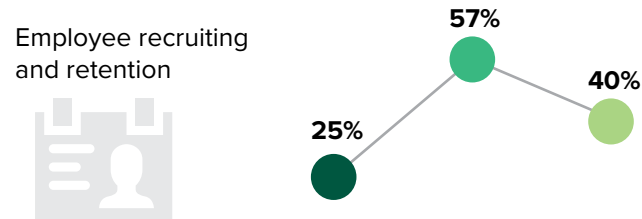
Fears Around Data Loss, Security, And Lack Of IT Support Are Palpable

Firms have made big changes — and will continue to do so — to ensure their operating procedures for remote working are secure and reliable. However, as business leaders quickly draft new rules, they are likely to miss or overlook many safeguards. That means significant exposure to new and existing risks.

For instance, attackers are increasing their focus on quarantined employees through email phishing, software exploitation, and even direct fraud. Firms struggle with tracking remote employees' behavior and risk data or IP loss (36%). Cloud-based desktop virtualization limits this data and IP loss because data doesn't reside on devices. Firms must invest in such a suite that integrates threat prevention, detection, and automatic response without security admin involvement.

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"What are the three biggest challenges your organization faces with remote working?"

36%
Data or IP loss

35%
Lack of IT skills to support

31%
End-user productivity

29%
Providing the right devices to specific workers

28%
Integrating collaboration tools

Overview

Situation

Approach

Opportunity

Conclusion

IT Leaders See Holistic Opportunities With Modern Management

Most enterprises were not ready for a world where workers have secure, remote access to networks and systems. In response, ITDMs view modern management to be important across different areas:

Improved security. Modern management improves security through conditional access, device compliance, and protection of data.

Value-add services. Specific employees require specific tools; out-of-the-box deployment and better hardware management boost EX and productivity.

Policy configuration. This involves transitioning legacy Group Policy Objects (GPOs) to modern configuration service providers (CSPs) as well as utilizing cloud-based UEM policies to manage common policies like passcode — all of which saves time.

"In your view, how important are the following areas of modern management?"

● Important   ● Very important

Threat analytics

| 35% | 38% |

Centralized policy management of all endpoint devices

| 40% | 33% |

Reporting

| 37% | 32% |

Costs

| 44% | 24% |

Automated tasks

| 38% | 30% |

Endpoint analytics

| 31% | 36% |

Application deployment

| 38% | 28% |

Employee engagement

| 36% | 29% |

App analytics

| 36% | 27% |

Overview

Situation

Approach

Opportunity

Conclusion

Leaders Will Deploy Technology With EX In Mind

Firms moving to modern management can create psychologically safe environments by fostering trust and supporting employees to address their needs like better device support, flexibility, and growth.

To support this, enterprises are keeping EX on top of mind. For instance, organizations are increasingly moving technologies like virtual desktop infrastructure (VDI) to the cloud. Cloud desktops drive better EX, enabling more dynamic, secure, flexible access to enterprise resources on a global scale that's critical in the ongoing working-from-home transformation.

UK ITDMs highlighted the need to conduct surveys to ensure employees are happy with new processes and new ways of working (59%) and provide relevant training to better utilize the digital workspace (58%).

"As your company moves to modern management, how will you ensure that you continuously provide a good experience for employees?"
Select top 5

64%
We aim to provide a seamless work environment, wherever employees are located.

59%
We have designed a structured communication plan to let employees know of upcoming changes.

59%
We'll conduct surveys to make sure employees are happy with new processes (e.g., onboarding).

59%
We are investing in an end-user experience management platform to send pulse surveys directly to employee devices.

58%
We'll offer classes and training on how to utilize the digital workspace.

Modern Management: A Platform For Enabling Next-Gen Workforce Experience

Cloud content platforms are an essential solution for remote work that on-premises systems lack, offering infrastructure elasticity, continuous innovation, and easier remote access. Over the next 24 months, IT leaders plan to increase collaboration (64%) and modernize end-user computing infrastructure to provide a better EX (61%).

Today, most companies run VDI workloads on-premises, but challenges with cost, complexity, and end-user experience are prompting IT leaders to look at cloud as a solution. For instance, 56% are increasing use of as-a-service hardware offerings, like PC as a service.

Overview

Situation

Approach

Opportunity

Conclusion

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"As your organization plans for the long term, how much of a priority are each of the following initiatives for the next 24 months?"

● High priority   ○ Critical priority

Increase collaboration between IT and lines of business (LOBs)

| 36% | 28% |

Create a comprehensive strategy and implementation plan for remote work technology

| 34% | 30% |

Improve help desk support for employees

| 42% | 22% |

Increase overall IT efficiency through consolidation of technology

| 38% | 25% |

Modernize end-user computing infrastructure to provide a better employee experience

| 38% | 23% |

Improve mobility and support more flexible workstyles

| 36% | 23% |

Increase use of as-a-service hardware offerings (PC as a service, device as a service)

| 35% | 21% |

Conclusion

Our survey of 154 IT decision-makers revealed that:

A move to cloud is inevitable for end-user computing services.
To provide flexible remote access, firms must begin moving key EUC services to the cloud. To begin, identify employee personas that can easily benefit from a cloud-based strategy.

Greater integration between ITOps and security is essential.
Collaboration among tech leaders must extend to the tech itself: Endpoint management tools must aid security teams with endpoint prevention, detection, and remediation capabilities. Specifically, modern management limits data exfiltration, enforces compliance of devices, and ensures patch success.

Leaders must focus on more than tech to improve EX. While modern management, cloud-based VDI, and other end-user computing services are maturing to improve EX, ITDMs must also adopt a strategy for EX management that consists of surveying, change management, persona building, and endpoint analytics to supplement the architectural changes in endpoint management and computing.

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Contributing Research:

Forrester's Infrastructure and Operations research group

Overview

Situation

Approach

Opportunity

Conclusion

Methodology

This Opportunity Snapshot was commissioned by VMware and Bytes. To create this profile, Forrester Consulting supplemented this research with custom survey questions asked of IT decision-makers exploring the attitudes of remote work and the challenges of end-user computing and managing endpoints in a universal way. The custom survey began in November 2020 and completed in January 2021.

ENDNOTES

[1] Source: "The State Of Remote Work, 2020," Forrester Research, Inc., July 6, 2020.

ABOUT FORRESTER CONSULTING

Forrester Consulting provides independent and objective research-based consulting to help leaders succeed in their organizations. Ranging in scope from a short strategy session to custom projects, Forrester's Consulting services connect you directly with research analysts who apply expert insight to your specific business challenges. For more information, visit forrester.com/consulting.

Demographics

COUNTRY

UK: 100%

POSITION OF RESPONDENT

Manager: 26%

Director: 27%

VP: 30%

C-level: 17%

INDUSTRY

Financial services: 21%

Retail: 21%

Healthcare: 21%

Legal services: 21%

Government: 17%

DEPARTMENT

IT: 39%

Operations: 33%

HR: 28%

Note: Percentages may not total 100 because of rounding.